Task Template - Setup

Tasks is a convenient feature that can be setup to auto populate to individual Jobs based on the Job date fields and can be pre-assigned to any of the employee fields.

To setup a Task Template in Restoration Manager go to Settings → System Setup → Task Templates

To proceed click Add
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After clicking on Add; Name, Status (Active or Inactive), Type (Job or Company), Auto-Create Condition, Company, Job Type, Loss Type, Sites, Order, Task Type, Task, Description/Email Template, # of Days, Prev Depend, Assignee and Send Completed Task Email will be displayed.

Apply the Name of the new template that will be setup.

Name:

Select the Type (Job or Company) from the drop down. If Job has been selected, then the tasks setup within the template will need to be Job related. If Company has been selected, then the tasks within the template will need to be Company related.
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Select which **Auto-Create Condition** will be used from the drop-down, the condition determines when the template will generate the required tasks/actions to be performed.

*Note:* There are no Auto-Create Conditions available when Company is selected for the Type and the template must be manually applied to the Company. When “None” is selected then the template will need to be manually applied to the Job. When “Job Creation” is selected that means all Tasks for this Template will be applied to every new job created.

To define which **Companies**, **Job Types** or **Loss Types** are applicable to the Task Template choose from the related field. If any of these fields are left blank, then the Task Template will be applicable to all. The **Sites** selection cannot be left blank this is required for template to be applied manually or automatically.

1. Select the **Task Type** from the drop down.

   **Task Types**
   - Standard – needs to be completed by the Assignee
   - Auto Email – automatically sends an Email
     - The email can be sent to the Primary Contact, Secondary Contact, Referral Source, Agent/Broker, Adjuster or Customer (customer is user definable by the admin) applied to the Job.
     - The email can be sent Anytime or Between a particular time.
     - You can attach one file to the email

2. Enter the **Task**

3. Within the **Description/Email Template** field if Task Type Standard was selected the apply the Description of the Task. If Task Type Auto Email was selected, then select the Email Template from the drop down.

4. Enter the **# of Days** the task is to be performed and completed by.

5. If applicable check **Prev Depend** *See below for Prev Depend explanation*

6. Select the **Assignee** from the drop-down this is the employee responsible to complete the Task or who the auto email will come from.

7. **Send Completed Task Email**; check the box if you would like the completed task email sent.

8. When you are finished setting up the Task Template click the **save icon** located to the bottom left of the page.

*Note:* Only ten (10) tasks can be assigned to one template
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IMPORTANT: The order number displayed below is not the order number the Tasks will assign to the Job or Company when applied. When the Tasks are added to the job they will display in Due in Days first then Alpha Order.

<table>
<thead>
<tr>
<th>Order</th>
<th>Task Type</th>
<th>Task</th>
<th>Description/Email Template</th>
<th># of Days</th>
<th>Prev Depend</th>
<th>Assignee</th>
<th>Send Completed Task Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Standard</td>
<td>Call the Customer</td>
<td>Make contact with the</td>
<td>0</td>
<td>0</td>
<td>Estimator</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Auto Email</td>
<td>Welcome Email</td>
<td>Restoration Manager &amp; MC</td>
<td>0</td>
<td>0</td>
<td>(S)</td>
<td></td>
</tr>
</tbody>
</table>

Prev Depend Explanation:
The way previous dependency works is it looks at the prior task in the order and continually moves the date out of the task until the previous task is marked completed. The 2nd task should always have a due in days as at least 1 day out. If it is set to 0, both tasks will appear due today.

Prev Depend Example: Task 1 is set up with a Due in Days of 0 and Task 2 is marked as Prev Dependency and has a Due in Days as 3. When the task template applies to the job, both tasks show up, Task 1 is Due 7/28/19 and Task 2 is Due 7/31/19. Task 1 does not get completed today. Tomorrow, Task 1 shows as Overdue and Task 2 will have a Due Date of 8/1/19. Task 1 is finally completed Monday, Task 2 will now have a due date firm of 8/2/19.

Tips: Drag the /// located in the bottom right hand corner of the Description/Email Template field to expand. Another option to display the Description/Email Template field click the magnifying glass the field will now be displayed in a pop-up dialogue box. The description can be applied within the pop-up remember to select save before closing the pop-up.
**Task Template - Setup**

**Example Task Template:**

Name: Post Construction Tasks  Status: Active  Type: Job

Auto-Create Condition: Work Start Date End

<table>
<thead>
<tr>
<th>Task</th>
<th>Description/Email Template</th>
<th># of Days</th>
<th>Prev Depend</th>
<th>Assignee</th>
<th>Send Completed Task Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean Up</td>
<td>Post construction clean up</td>
<td>0</td>
<td>0</td>
<td>Project Mgr</td>
<td></td>
</tr>
<tr>
<td>Verify all Signatures</td>
<td>Verify all COS, Final, etc.</td>
<td>0</td>
<td>0</td>
<td>Project Mgr</td>
<td></td>
</tr>
<tr>
<td>Approval of Estimates, Gypsum, etc.</td>
<td>Approval of invoices</td>
<td>4</td>
<td>0</td>
<td>Project Mgr</td>
<td></td>
</tr>
<tr>
<td>Chase Payments</td>
<td>Chase Payments</td>
<td>7</td>
<td>0</td>
<td>Accountant</td>
<td></td>
</tr>
</tbody>
</table>

**Example Task Template, including Auto Email:**

Name: New Customer Tasks  Status: Active

Auto-Create Condition: Date Received

<table>
<thead>
<tr>
<th>Task</th>
<th>Description/Email Template</th>
<th># of Days</th>
<th>Prev Depend</th>
<th>Assignee</th>
<th>Send Completed Task Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call the Customer</td>
<td>Make contact with the estimator</td>
<td>0</td>
<td>0</td>
<td>Estimator</td>
<td></td>
</tr>
<tr>
<td>Auto Email</td>
<td>Welcome Email</td>
<td>0</td>
<td>0</td>
<td>Marketing Rep</td>
<td></td>
</tr>
</tbody>
</table>

Note: If task is triggered after the between time, email will send the following day.

Revised 02/02/2019